	ROUTING AN	ID RECOR	D SHEET
SUBJECT: (Optional) Automation So	urce Selection	n Plan	
FROM:		<b>N</b>	FBIS-1225/85
			DATE 18 April 1985
TO: (Officer designation, room number, and building)	DATE  RECEIVED FORWAR	OFFICER'S INITIALS	COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)
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FBIS-1225/85 18 April 1985

MEMORANDUM FOR:	Director, Foreign Broadcast Information Service Chief, Procurement Management Staff, DDS&T	
FROM:	Contracting Officer, FBIS	STAT
SUBJECT:	Automation Source Selection Plan	

Attached please find the subject plan for your review and approval. The plan was developed in coordination with the Chief, System Development Staff; the Deputy Director, FBIS; and the Chief, Procurement Management Staff, DDS&T.



Attachment

## ADMINISTRATIVE - INTERNAL USE ONLY

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SUBJECT: Automation Source Selection Plan

APPROVED:

STAT

Chief, Procurement Management Staff, DDS&T

Date

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	SUBJECT:	Automation	Source	Selection	P1an
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**STAT** (16 Apr 85) DDS&T/FBIS/CO/

Distribution:

Orig - Director, Foreign Broadcast Information Service (w/att)
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#### AUTOMATION SOURCE SELECTION PLAN

#### 1.0 Overview

This plan describes the process that shall be followed during the evaluation of proposals for Automation, RFP 10-85. Each step is described in the sections that follow. Appendix A lists the personnel who shall participate in the evaluation process. Appendix B shows the projected schedule for the evaluation process. Appendix C contains the evaluation plan.

### 1.1 Receive and Distribute Proposals

The evaluation process shall be coordinated by the FBIS Contracting Officer (CO), who will assist the Source Selection Authority (SSA), and the Chief, System Development Staff, who shall also serve as the chairperson of the Source Evaluation Board (SEB). When proposals are received, the FBIS/CO shall log each proposal and forward the required number of copies to the chairpersons of the respective evaluation panels and the source evaluation board chairperson. The cost evaluation panel shall receive only the cost sections of the proposals; the technical evaluation panel shall receive the technical and build plan proposals; and the management evaluation panel shall receive the management and build plan proposals.

The function of the evaluation panels is to evaluate each offerors proposal against the criteria established in the RFP. The evaluation panels shall identify, within the scope of its evaluation area, items within each proposal which are ambiguous, uncertain and unclear; items which are responsive to the RFP; and items which are deficient. A "deficiency" is defined as a requirement as established in the RFP that is not satisfied in the proposal.

#### 2.0 Evaluations

#### 2.1 Technical Evaluation

Technical evaluations shall be performed by the technical panel. These evaluations shall be performed independently of the cost and management evaluations. However, interaction with the cost evaluation panel shall be allowed if needed, as determined by the Contracting Officer. The technical evaluation panel shall utilize the evaluation criteria and procedure described in Appendix C of this document. The panel shall report the results of its evaluations to the SEB. The reports shall contain the following:

A list of the strong and weak points of each proposal, and identification of potential risks.

A list of deficiencies for each proposal, specifying items to which the proposal is nonresponsive, from a technical standpoint. A summary of the point score ratings awarded to each proposal during the evaluation process. The summary shall represent a consensus of the panel. Should any member(s) of the panel hold a minority opinion regarding the evaluation(s) and/or ranking, a minority report shall accompany the panel report and the minority report shall detail the basis and rationale for the descending opinion. The panel summary shall include an overall narrative evaluation of each proposal.

#### 2.2 Management Evaluation

Management evaluations shall be performed by the management panel. These evaluations shall be performed independently of the cost and technical evaluations. However, interaction with the cost evaluation panel shall be allowed if needed, as determined by the Contracting Officer. The management evaluation panel shall utilize the evaluation criteria and procedure described in Appendix C of this document. The panel shall report the results of its evaluations to the SEB. The reports shall contain the following:

A list of the strong and weak points of each proposal, identifying potential risks.

A list of deficiencies for each proposal, specifying items to which the proposal is nonresponsive, from a management standpoint.

A summary of the point score ratings awarded to each proposal during the evaluation process. The summary shall represent a consensus of the panel. Should any member(s) of the panel hold a minority opinion regarding the evaluation(s) and/or ranking, a minority report shall accompany the panel report and the minority report shall detail the basis and rationale for the descending opinion. The panel summary shall include an overall narrative evaluation of each proposal.

#### 2.3 Cost Evaluation

The cost evaluation shall be performed by the cost evaluation panel and shall initially be conducted independently of the technical and management evaluations. After the technical and management panels have submitted their formal reports to the SSEB, selected members of the technical panel shall review the cost proposals to determine cost creditability of the technical approach each offeror proposed. At the conclusion of the evaluation, the panel shall submit a cost evaluation report to the SEB a containing the following:

A list of deficiencies for each proposal, specifying items to which the proposal is nonresponsive, from a cost standpoint.

A list of cost items for each proposal which requires further clarification.

A list of the Offerors whose proposed costs deviate significantly from the Government "should cost" estimate range for the proposed design approach.

3.0 Determination of Offerors in the Competitive Range

The SEB, using the reports and evaluations from the respective panels, shall recommend to the Source Selection Official (SSO) the offerors considered to be in the competitive range. An Offeror is in the competitive range if he has a reasonable chance of being selected for contract award after the final offers are received. Offerors whose proposals contain deficiencies may still be considered to be in the competitive range. This would be the case if, in the judgement of the SEB, it is feasible for the Offeror to correct the deficiencies in a final offer. The SEB shall submit recommendations to the SSO. The recommendation shall contain the following:

A rank ordered list of offerors recommended to be in the competitive range.

A list of deficiencies for each proposal.

A list of items needing further clarification for each proposal.

A list of Offerors no longer considered to be in the competitive range and the reasons for this determination.

Upon the SSO's approval the SEB shall make a presentation of its recommendations to the SSA for approval. The SSA shall make the final determination regarding those offerors to be considered in the competitive range.

#### 4.0 Discussions and Negotiations

The Contracting Officer shall notify each offeror in the competitive range that he is still being considered for contract award. He shall hold discussions with each of these offerors and provide a list of areas in which the offeror is deficient. The Contracting Officer shall solicit clarification for those areas of each proposal which are unclear. He shall ask that revised offers be submitted by the offerors which remain in the competitive range. Offerors shall have an opportunity to correct their areas of noncompliance in their revised offers. The Contracting Officer shall also notify each Offeror who is not in the competitive range that he is no longer being considered for contract award, and he shall provide the reasons for dropping the Offeror from contention, if formally requested. At the completion of discussions and negotiations, the Contracting Officer shall place a common cutoff date for the submission of revised offers.

#### 5.0 Receive Final Proposals

The Contracting Officer shall distribute the final proposals in the same manner as the original proposals were distributed.

#### 6.0 Final Evaluation

Each of the evaluation panels shall evaluate the final offers using the same criteria and procedures used during the initial evaluation, as stated previously. Each evaluation panel shall deliver a final evaluation report to the SEB. The format of the reports shall be the same as used in the initial evaluation reports.

#### 7.0 Source Evaluation Board Recommendation

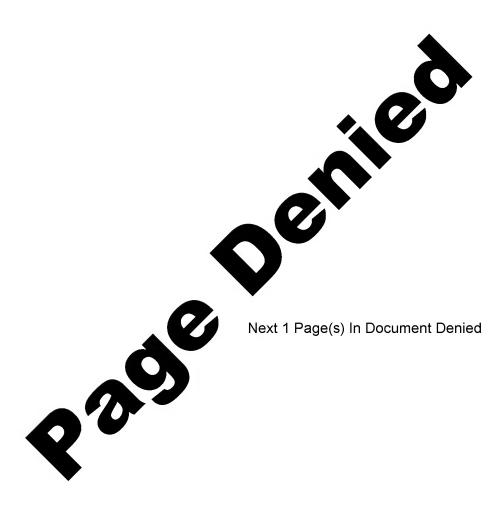
Using the results of the previous evaluation and considering other factors the SEB shall recommend which offeror(s) is/are most likely to perform in the manner most advantageous to the Government. The Board shall make a formal written recommendation to the SSO which offerors are to be considered for further negotiations and contract award.

#### 8.0 Contract Award

The SSO shall consider the recommendations of the SEB and shall recommend to the contracting officer (SSA) which offeror(s) recommended for contract award. Should the SSO decide award of the contract is to be made to an Offeror other than the selection recommended to him by the SEB, he must document his rationale for doing so in the form of a memorandum to the SSA with a copy to be furnished to the SEB. The SSA shall make, with Agency Contract Review Board approval, the final determination regarding contract award.

#### 9.0 Agency Contract Review Board (ACRB)

The FBIS Contracting Officer and the SEB Chairperson shall prepare the ACRB docket recommending award to the selected offeror and formally present the case. Negotiations, award or other action as directed by the ACRB shall be instituted as appropriate.



#### FBIS AUTOMATION SYSTEM

### EVALUATION AND NEGOTIATION SCHEDULE

TARGET DATE	ACTIVITY
18 April	Panel Members Briefing
22 April	Proposals due from offerors
22 April	Evaluation panel chairpersons and auditor receive copies of proposals
3 May	Evaluations complete & Panel reports due to SSEB
8 May	SEB recommends competitive range to SSO and SSA
9 - 17 May	Discussions with offerors in the competitive range
29 May	Revised proposal(s) due
5 June	Revised proposal evaluations complete by panels & submitted to SEB
7 June	SEB recommendation to SSO and SSA
11 June	Docket due to the Contract Review Board
18 June	Presentation to CRB
19 - 21 June	Negotiations with contractor(s) to whom award is anticipated
21 June	Contract award
26 June	Debriefings to non-selected contractors

#### FBIS MODERNIZATION EVALUATION CRITERIA

The following criteria and scores will be used to evaluate and rank each proposal.

	Category	Volume
(2) (3)	Technical Approach Management Plan and Staffing Corporate Experience Program Build Plan Cost	I II II Appendix A to Volume II III

For evaluation purposes each category has been broken down into a number of sub-categories. These sub-categories will be rated on a scale of 0-10. To maintain uniformity, the following guidelines have been established.

Score Range	Capability
0 3	Unacceptable Poor Below minimum government standard
5	requirements/high risk Average Meets Minimum government standard
8	requirements Very Good Exceeds the
10	requirements in most areas Excellent Outstanding in every area

Weights assigned to each sub-category are listed on the evaluation worksheets.

#### Evaluation Topics

1.0 Technical Approa	ach	L App	ica1	Techr	1.0
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- 1.1 Understanding of the Modernization effort
- 1.2 Understanding and identification of the risks
- 1.3 How well does the design satisfy the Specifications1.4 Utilization of a formal analysis and design methodology
- 1.5 Developmental planning (code and test)
- 1.6 Integration and test planning
- 1.7 Installation and transition planning1.8 Training planning
- 1.9 Maintenance planning

#### 2.0 Management Plan and Staffing

- 2.1 Project Plan and Control
- 2.2 Configuration Management planning
- 2.3 Project Manager
- 2.4 Project Staffing
- 2.5 Key Personnel (Top 5)

#### 3.0 Corporate Experience

- 3.1 Projects of similar characteristics and scope in which the Contractor was the Prime/Systems Developer dealing with evaluation, purchasing and modification of hardware and software; integration; and training
- 3.2 Availability of corporate resources
- 3.3 Manpower Estimates

#### 4.0 Program Build Plan

- 4.1 Phasing Approach and Building Blocks
- 4.2 Activity schedule, inter-dependencies
- 4.3 FBIS priorities4.4 Facility Constraints

#### 5.0 Cost

- 5.1 Total Cost
- 5.2 How realistic are the costs and labor hours in the relationship to the WBS? (Recurring and Non-recurring)
- 5.3 Will the proposed cost control plan and cost control systems assure a final cost within the estimate?
- 5.4 Proposed Incentive Fee Plan

Name	of	Grader

## Technical Approach Worksheet

Contr	ictor					
		Rating	X	Weight	= Score	
1.1	Understanding of the Modernization Effort  o Degree of understanding demonstrated by contractor as to FBIS mission, requirements, specifications and S.O.W.		X	1	=	-
1.2	Understanding and identification of the risks  O Are hardware and software products proving in similar applications?  O Critical areas noted (New Code, Integration, Modify Hardware Software, Single Point Failures)  O Plan to control these areas (Technical, Cost, Schedule, Use of Prototyping)		X	2	=	-
1.3	How well does the design satisfy the Specifications  O Systems Engineering: Soundness of approach, availability, reliability, maintainability, expandability  O Plans for modeling to assure FBIS of proper fit O Performance and System Response Time O Use of Traceability Matrix (Spec-Design) O Degree of modifications to hardware and software		X	4	=	_
1.4	Utilization of a formal analysis and design methodology o Ease of making changes o Ease of traceability to specification o Visual documentation		X	.5	=	_
1.5	Developmental planning (code and test) Developmental methodology, use of standards, and tools		X	.5	=	_

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1.6	Integration and test planning	X .5 =
	o methodology, quality and completeness	
1.7	Installation and transition planning	X .5 =
	o Methodology, quality and completeness	
1.8	Training Planning	X .5 =
	o Methodology, quality and completeness	
1.9	Maintenance Planning	X .5 =
	o Methodology, quality and completeness	
		Total ScoreT

Name	of	Grader_	
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## Management Plan and Staffing Worksheet

Contra	ctor					
		Rating	X <u>W</u>	eight	$\underline{\underline{Score}}$	
2.1	Project Plan and Control  O Quality and completeness of the plan O Defining and controlling all tasks to produce the deliverable items in SOW 5.0 O Utilization of tools to assure FBIS of project timeliness and proper reporting of status.		X	2	=	_
2.2	Configuration Management Planning O Quality and Completeness of the Plan O Quality Assurance O Hardware and Software O Procedures and Documentation		X	1	=	
2.3	Project Manager o Qualifications for this project o Experience o Position of project manager in corporate structure		X	4	=	
2.4	Project Staffing Proper mix of skills (Personnel from Prime and Subcontractors)  o Available within required time o Proper effort per task     (Full time, part time, location)     (Replacement policy for key personnel)		X	_1	=	
2.5	Key Personnel (Top 5) Degree to which key personnel demonstrate proven expertise in the areas below to include years of experience and educational background o Computer hardware o Software o Information storage and retrieval	ed)	X	2	<del></del>	

(continued on next page)

Publishing (Word Processing, Text Editing, 0

Composition, Graphics)
Office Automation (Electronic Mail, W-P,
Spreadsheet, File Management)
Systems Engineering (Development, Evaluation, 0

0 Integration)

User training 0

Installation and Transition to operational 0 environment

Total ScoreT

		Name of Grader
	FBIS MODERNIZATION	š
	Corporate Experience Workshee	<u>et</u>
Contr	actor	
		Rating X Weight = Score
3.1	Projects of similar characteristics and scope in which the Contractor was the Prime/Systems Developer dealing with evaluation, purchasing and modification of hardware and software; Integration; testing; and training.	X 5 =
	o Is the project similar in: Size, complexity, functions, installation, training, and controls	
3.2	Availability of corporate resources (external to the project) if Required  O Organizational Structure Relative to Modernization Effort  O Communications Methodology (Intra and to the Government)  O Management Interaction  O External Resources, if required	X 2 =
3.3	Manpower Estimates Proper distribution of Labor Across 1st level WBS	X 3 =
		Total Score

Name	of	Grader

## Program Build Plan Worksheet

Contr	actor	Rating	X 1	Weight	= Score
4.1	How well does the blocking meet FBIS Requirements? Is it reasonable? Is it logical from a systemmatic management standpoint?		X	5	=
4.2	How reasonable is the activity schedule? Does it illustrate the inter-dependencies?		Χ	2	=
4.3	Does the plan reflect the FBIS priorities?		X	1	=
4.4	Does the contractor design reflect floor space limitation? Is the layout logical and operator effective?		X	2	=
		Total:	Sco:	reT	<del></del>

		Name	of G	rader_		
	FBIS MODERNIZATION <u>Cost Worksheet</u>		ú,			
Contr	actor					
		Ratin	g X <u>I</u>	Weight	= Score	
5.1	Total proposed costs (Range*)		X	3	=	
5.2	How realistic are the costs in the relationship to the WBS; o Labor hours by category o Materials/Equipment Estimates o Subcontracts o Travel		X	6	=	
5.3	Will the proposed cost control plan and cost control systems assure a final cost within the estimate?		X	.5	=	
5.4	How beneficial is the Fee incentive.		Х	.5	=	
		Total	Scoi	re	<u> </u>	

\*Range will be presented to the cost panel by the chairman prior to start of evaluation.

#### FINAL SHEET

#### FBIS MODERNIZATION PROGRAM

#### SCORES FROM THE EVALUATION SHEETS

Α.	Contractor	COST	TECHNI CAL	MANAGEMENT
		PT x % =	PT x % =	PT x % = (P&P) (MP&S) (Corp) Total
В.	Contractor	COST	TECHNICAL	MANAGEMENT
		PT x % =	PT x % =	PT x % = (P&P) (MP&S) (Corp) Total
C.	Contractor	COST	TECHNICAL	MANAGEMENT
		PT x % =	PT x % =	PT x % = (P&P) (MP&S) (Corp) Total
D.	Contractor	COST	TECHNICAL	MANAGEMENT
		PT x % =	PT x % =	PT x % = (P&P) (MP&S) (Corp) Total
Ε.	Contractor	COST	TECHNICAL	MANAGEMEN'T
		PT x % =	PT x % =	PT x % = (P&P) (MP&S) (Corp) Total

\*Note: PT = Panel Total FT = Final Total

F.	Contractor	COST	TECHNICAL	MANAGEMENT
		PT x % =	PT x % =	PT x % = (P&P)
				(MP&S) (Corp) Total
G.	Contractor	COST	TECHNICAL	<u>MANAGEMENT</u>
		PT x % =	PT x % =	PT x % = (P&P)
				(MP&S) (Corp) Total
Н.	Contractor	COST	TECHNICAL	MANAGEMENT
		PT x % =	PT x % =	PT x % = (P&P)
				(MP&S) (Corp) Total
I.	Contractor	COST	TECHNICAL	MANAGEMENT
		PT x % =	PT x % =	PT x % = (P&P)
				(MP&S) (Corp) Total
J.	Contractor	COST	TECHNICAL	MANAGEMENT
		PT x % =	PT x % =	PT x % = (P&P)
				(MPGS) (Corp) Total
К.	Contractor	COST	TECHNICAL	MANAGEMENT
		PT x % =	PT x % =	PT x % = (P&P)
				(MP&S) (Corp)
				Total

L.	Contractor	<u>COST</u> PT x % =	TECHNICAL  PT x % =	MANAGEMENT  PT x % = (P&P) (MP&S) (Corp) Total
М.	Contractor	<u>COST</u> PT x % =	TECHNICAL PT x % =	MANAGEMENT         PT x % =         (P&P)         (MP&S)         (Corp)         Total
N.	Contractor	<u>COST</u> PT x % =	TECHNICAL PT x % =	MANAGEMENT         PT x % =         (P&P)         (MP&S)         (Corp)         Total
0.	Contractor	COST PT x % =	TECHNICAL PT x % =	MANAGEMENT  PT x % = (P&P) (MP&S) (Corp)  Total
Р.	Contractor	COST PT x % =	TECHNICAL  PT x % =	MANAGEMENT         PT x % =         (P&P)         (MP&S)         (Corp)         Total
Q.	Contractor	<u>COST</u> <u>Pr</u> x % =	TECHNICAL PT x % =	MANAGEMENT         PT x % =         (P&P)         (MP&S)         (Corp)         Total

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R.	Contractor	COST	TECHNICAL	MANAGEMENT
		PT x % =	PT x % =	PT x % = (P&P) (MP&S) (Corp)
s.	Contractor	COST	TECHNICAL	MANAGEMENT
		PT x % =	PT x % =	PT x % = (P&P) (MP&S) (Corp)
т.	Contractor	COST	TECHNICAL	MANAGEMENT
		PT x % =	PT x % =	PT x % = (P&P) (MP&S) (Corp)
U.	Contractor	COST	TECHNICAL	MANAGEMENT
		PT x % =	PT x % =	PT x % = (P&P) (MP&S) (Corp) Total